

# MANAGEMENT AND BUDGET ANALYST

**GRADE: 22**

**FLSA: EXEMPT**

## **CHARACTERISTICS OF CLASS:**

The Management and Budget Analyst performs difficult professional and administrative work relating to preparing, monitoring and maintaining the City's annual budget and the five-year Capital Improvements Program (CIP). The position also assists in developing reports and presentations for the City Manager and Mayor and Council, maintaining the position control system, and evaluating revenue and expenditure projections. The incumbent uses considerable tact, discretion and persuasion providing policy guidance in the areas of fiscal management and general operations. The position has limited physical demands but there is considerable stress involved in handling multiple projects, dealing with many agendas, and meeting time-sensitive deadlines. The work is subject to functional policies and goals under general managerial direction and contributes to the organization's mission of service. Work includes some direction of other employees engaged in fiscal management work.

## **EXPECTATIONS OF ALL CITY EMPLOYEES:**

- Learn and demonstrate an understanding of City, department, division and team goals.
- Serve and meet the needs of customers.
- Ability and willingness to work as part of a team, to demonstrate team skills and to perform a fair share of team responsibilities.
- Ability to assess his/her work performance or the work performance of the team.
- Plan and organize his/her work, time and resources, and if applicable that of subordinates.
- Contribute to the development of others and/or the working unit or overall organization.
- Produce desired work outcomes including quality, quantity and timeliness.
- Communicate effectively with peers, supervisors, subordinates and people to whom service is provided.
- Understand and value differences in employees and value input from others.
- Consistently report to work and work assignments prepared and on schedule.
- Consistently display a positive behavior with regard to work, willingly accept constructive criticism and be respectful of others.

## **EXAMPLES OF DUTIES:**

- Uses Excel, PowerPoint, Word and the City's financial system extensively to develop budget book material and other budget-related presentations.
- Coaches and assists program managers in their financial management efforts.

- Takes an active role in the City's budget development process, including the following: preparing data for use by departments in developing their budget submissions; providing assistance and guidance for program managers; evaluating the reasonableness of budget submissions; developing revenue and expenditure projections; tracking changes to the budget plan; consolidating data and preparing reports; and preparing material for Mayor and Council meetings.
- Prepares budget-related communications with City departments, government agencies, businesses and citizens.
- Assists in maintaining the position control system.
- Provides guidance, counsels and trains City staff in the use of computer programs, the finance system and complex spreadsheet applications necessary for budget preparation and monitoring.
- Maintains the Capital Improvement Program and operating budgets within the accounting system in conformance with the appropriate ordinances.
- Evaluates proposed program changes and enhancements with respect to short- and long-term costs.
- Monitors City revenue and expenditure patterns and assists departments in reconciling budget difficulties that arise in the course of the fiscal year.
- Performs other duties as required.

### **QUALIFICATIONS:**

#### **Required Training and Experience:**

Any combination of training and experience equivalent to a bachelor's degree from an accredited university or college in economics, public administration, finance, accounting or related field and some experience in budgeting or accounting or related work, preferably in a local government. A master's degree in economics, public administration, finance, accounting or a related field may be substituted for work experience.

#### **Preferred Knowledge, Skills and Abilities:**

- Substantial knowledge of quantitative methods including cost/benefit analysis, performance measurement, revenue and expenditure forecasting and other related techniques relative to annual budgets, CIPs and long-term fiscal analysis.
- Knowledge of data collection and analysis techniques.
- Basic understanding of accounting, economics, public management, policy analysis and statistics.
- Skill in exercising independent judgement, decision-making and problem-solving.
- Ability to communicate simply and clearly, both orally and in writing, to audiences with little or no background in budgeting or fiscal analysis.
- Ability to follow complex written and oral instructions, and to understand federal, state and local rules and regulations.
- Ability to present report findings in written, oral and graphic formats.

- Ability to utilize computer software to process, analyze and present data.
- Ability to deal effectively with individuals and groups on matters such as strategies, management, policies and procedures.